

1 2 JUL 1982

MEMORANDUM FOR: Chief, Classification Review Division
Chief, Information and Privacy Division
Chief, Records Management Division
Chief, Regulations Control Division

FROM:

Director of Information Services

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SUBJECT: Third Quarterly Planning Session

1. After completion of our second quarterly planning session with the DDA, he distributed a memorandum for all Office Directors outlining how he wanted to see future such sessions conducted. A copy of that memorandum is attached. You will note that he wants to cover each of the milestone objectives for the quarter. Basically, we have been doing this, but I think we have to concentrate more on this aspect. In general, we have either met our milestones or have reasonable reasons why we have not.

2. You all have copies of the milestone charts for the entire FY 1982 with the scheduled completion dates of each milestone indicated by an "O." We have never indicated on the chart, with an "X," the actual date on which we reached that milestone. I want to forward to the DDA before the next session, which is scheduled for Monday, 2 August, an updated chart for each objective. Please enter an "X" for each milestone reached, in the appropriate month. Where a milestone has been passed and we have not yet reached the expected completion date, enter a series of dashes from the present "O" to the new date on which it will be completed (i.e., O-----O). I also expect each of you to be able to explain why planned milestone dates were not met, if requested.

3. I would like to spend one hour reviewing the milestones with the major portion of that time spent reporting on RMD objectives. I would like for Chief, ITB to make the presentation on TRIS and Chief, RSB the presentation on the Headquarters records review. I also want to have Chief, RMD report on the capability to audit component records management procedures and the development of the micrographics and audiovisual programs. I want Chief, CRD to report on the visits to the Presidential libraries and the manuscript review procedures. Chief, IPD should report on the delay in the revision of HHB 70-1 and the revision to the Code of the Federal Register. The Executive Officer, OIS, should be prepared to report on the revision of the OIS Personnel Handbook and the training program. For this session, I would like to skip RCD since they have been meeting their milestones, and there were none scheduled for completion during the past quarter. Each presentation

should last no longer than ten minutes, and time should be allowed for questions and answers.

4. Please get your completed milestone charts back to by 16 July. I would like to have a dry run of the briefing during the week of 19 July. Date and time will be provided later.

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Attachment:
As stated

for

DDA 82-1062

23 APR 1982

MEMORANDUM FOR: Director of Communications
Director of Data Processing
Director of Finance
Director of Information Services
Director of Logistics
Director of Medical Services
Director of Security
Director of Training and Education

FROM: Harry E. Fitzwater
Deputy Director for Administration


SUBJECT: Quarterly Planning Sessions

1. As we near the completion of the second round of quarterly planning sessions, I would like to express my appreciation for the efforts devoted to this activity. It is obvious that your officers are expending substantial time and energy in preparing for these sessions--their presentations are most informative. In addition to gaining an increased insight into your programs, it affords me an excellent opportunity to meet with your key personnel. I hope that these exchanges also benefit you and your personnel by gaining a clearer focus on your own activities and by obtaining whatever information I may have to impart regarding the thrust of your efforts.

2. In order to be most effective, quarterly planning sessions should normally be scheduled for no more than 90 minutes. One hour should concentrate on the milestone objectives for the quarter. A very brief statement or two on the specific objectives should be presented as an introduction, followed by specific remarks on the achievement of the milestone or the failure to achieve same. Most of the presentation should deal with how the objective was achieved, results, "payoffs," and problems encountered along with remedial courses of action. The remaining 30 minutes of the planning session should provide sufficient time for the interjection of questions, comments, and additional points to be covered by Office directors, the ADDA, and me. It would seem appropriate for the Office director to provide a brief introduction at each session, and I will conclude the sessions with a few brief remarks.

3. Occasionally, there may be a need to extend a particular planning session to two hours in order to discuss a particularly troublesome issue, whether related to an objective or not. This extension of normal time should be scheduled in advance.

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Harry E. Fitzwater

CRD Mission Statement

CRD - develops and implements procedures in support of other U.S. Government agencies and the Presidential Libraries concerning their programs of systematic review of permanent records by reviewing that material for which the Agency is responsible; conducts and coordinates the Agency review of U.S. Government official histories including the Foreign Relations of the United States from the Department of State, and official U.S. military histories from the Department of Defense; conducts classification reviews on behalf of the DDA, except for the Office of Security, on manuscripts written by present and former Agency employees; conducts a variety of classification reviews on older material, usually 20 years old or older, under FOI, PA, and mandatory review requests; and performs records surveys and other activities designed to support the Agency's classification review and information release programs.

External Review Branch - conducts the Agency review effort in support of the systematic classification review programs of other U.S. Government agencies; maintains liaison with these other agencies to provide the review support and to engage in other activities such as records surveys as necessary to identify records of interest to the Agency and to arrange for their protection as required; conducts and coordinates the Agency review of U.S. Government official histories including FRUS series from the Department of State and U.S. military histories from the Department of Defense; and participates in other records support activities as required.

Internal Review Branch - reviews on behalf of the DDA, except for the Office of Security, manuscripts written by present and former Agency employees; conducts a variety of classification reviews on older material, usually 20 years old or older, under FOI, PA, and mandatory review requests; and participates in records surveys and other support activities as required.